Detailed Design Notes: <u>Day One</u> of Three-Day VSM Current State

P' = Participant HO = Hand-out FC = Flip Chart PW = Participant Workbook

Table of Contents

Appendix:

- Supplies/Materials Checklist
- Blank Data Sheet

CI-PRACTITIONER'S DETAILED AGENDA
DAY ONE OF THREE-DAY VSM: CURRENT STATE

- 7:00-8:00 **Set-up and Prep for VSM**
  - Orient yourself
  - Prepare room (Chairs & tables/ Flip Charts/Butcher Paper, etc.)
  - Assemble & put out materials (Name Tags/Workbook/Post-its/Sharpies/Supplies/Materials Kit)
  - Set-up computer
  - Practitioner Team "huddle"
- 8:00-8:30 **Start-up in VSM Teams**
  - Introduce Practitioner Team
  - Sponsor Welcome
  - Participant introductions
  - Logistics and overview
  - One-page "bubble" overview of VSM (PW p. <u>16</u>)
  - Roles and Responsibilities (PW p. <u>5-6</u>)
- 8:30-8:45 **Team Charter**
  - VSM Manager reviews Charter with p's (PW p. <u>8-10</u>)
  - Discuss boundaries/bookends
  - Identify Data Manager if haven't already
- 8:45-9:15 **Visualize Process to Be Mapped**
  - Read <u>Worksheet: Visualize Process to be Mapped</u> (PW p. <u>19</u>)
  - Individual brainstorming (3 minutes)
  - Round Robin posting
  - Team sorts & groups at the wall quickly
  - Team quickly names "chunks" of steps (White Papers, from the beginning)
  - Read Transition process mind-set
- 9:15-9:45 **Lean Concepts**
  - Elicit from p's: What is Lean?
  - Review <u>What is Lean</u>? & its principles (PW p. <u>14-15</u>)
  - Possibly: Flow Activity or Input (See separate design notes for flow activity)
- 9:45-10:15 **Worksheet VA & NVA**
  - Read & Discuss <u>Worksheet: Value-Added versus Non-Value-Added</u> (PW p. <u>20</u>)
  - Ask p's to complete VA exercise (PW p. <u>21</u>)
  - Debrief exercise and provide teaching points
- 10:15-10:30 **Break**
  - Meet with CI-practitioner team
- 10:30-10:40 **Working with Data Sheets**
  - Review/read <u>Working with Data Sheets</u> (PW p. <u>23</u>) & introduce quickly to the data sheets. Do not go into definitions/detail.
- 10:40-12:00 **Current State Mapping**
  - Read <u>Worksheet: Current State Mapping</u> (PW p. <u>22</u>)
  - Go to End Bookend: First identify & document 3 decisions: unit/volume/timeframe
  - Have Data Manager go to wall & identify team member to write step names.
  - What is the step just before this bookend?
  - Refer p's to <u>Data Sheet w/ Definitions</u> (PW p. <u>24</u>) and define/use as needed to complete the data for each step sheet.

- 12:00-12:30 **Lunch**
  - Meet with CI-practitioner team
  - FC questions if haven't already
- 12:30-2:15 **Current State Map continued**
  - What is the step just before this step?
  - Continue to complete the data for each step sheet.
- 2:15-2:30 **Break**
  - Meet with CI-practitioner team
  - Assess where team is and make adjustments as needed
- 2:30-3:00 **Current State Map Finish**
  - Finish mapping
- 3:00-3:30 **Current State Calculations**
  - Read/explain Worksheet: Calculating Current State Metrics (PW p. 27)
- 3:30-4:00 **Review Current State Data**
  - Ask p's to "step back" from process & see what it's telling them
  - Review practical tips
  - Mark areas needing improvement with red dots.
- 4:00-4:30 **Check-out and Assignment**
  - Give assignments
  - Round Robin or Matrix check-out

Time/Topic	Purpose and Method	Materials Resources
7:00-8:00 **SET-UP AND PREP FOR VSM**	**Purpose:** • Participants experience a well organized, confident, competent, and professional learning experience - all in service to enabling the team to accomplish their task and have a satisfying experience. **Methodology:** • Orient yourself to the facility (safety routes and hazards, restrooms, break rooms, lights, heat, ventilation, etc.) • Prepare the room o Arrange chairs (and tables if appropriate) in semicircle as close to front wall as possible. o Post butcher paper on the wall. - Write **BOOKENDS** on 8X11 paper- large block print – and place on butcher paper using removable tape. (Or write directly on the butcher paper.) - Be sure to leave about two feet at the end of the map (after the closing bookend) and headline the area "**METRICS**" in about 3" letters. Seven descriptors and their numbers will need to fit under this title. o Post "Parking Lot" o Post "Assumptions" [Document relevant information that may be useful during implementation, or after the work is completed. Document data assumptions on data sheets.] o Hang posters: Lean Principles/Concepts, Team Process Norms, BTC Goals (if applicable), 8 Wastes, etc. • Assemble materials so visible and easily accessible. • Have two easels/pads with markers and tape. • Set up computer and projector (if using) and call up programs. • Have participant materials at each seating area: o VSM Participant Workbook o Team Charter in p's workbook o Pencil/pen, 3x5 post-its, sharpie o Name tag (if needed) o Blue post-its to make notes to themselves – this is sort of their own individual parking lot. o Buff/Yellow post-its to use to capture notes, comments, and issues. • Create a "Welcome" flip chart • Lead CI-P check-in with practitioner team to ensure alignment. Note: Practitioner Team includes faculty (internal and/or external consultants) certified CIP, CIP's in training, or observers. The Lead CIP is responsible for managing the staffing "huddles" and meetings. • Greet participants as they arrive	• Checklist Materials/Supplies "kit" attached • Time keeping device • Posters - Lean concepts - Team norms • VSM Participant Workbook (PW) • Team Charter • FC's
8:00 – 8:30 **START-UP IN VSM TEAMS**	**Purpose:** • Set a tone of openness, learning, curiosity, and support in tandem with commitment and ownership. • Clarify expectations and create a shared understanding of the direction for the day. • Begin developing a unified identify as a team. • Establish trust, openness, and credibility as a CI-Practitioner. • Model effectively facilitating teamwork.	• VSM Participant Workbook • Flip chart (FC) of check-in or introduction task • Posters

Time/Topic	Purpose and Method	Materials Resources
	Methodology: • Introduce yourself and any CI-P partner(s) and observers. - Explain each person's role and what they can expect from you as you work together - Say a few words about why we're here and what we hope to accomplish. • Sponsor or Manager welcomes participants. Some points to talk to briefly include: (No more than 10 minutes) - Appreciation to participants for participating. - Learning facilitates change, and we're here to learn and apply new concepts and tools. This is to learn and do at the same time. - Link to BTC goals and larger organizational context. - Tell team members that "this is the work" – this is not an add-on. This is very important to understand ! - Name the boundaries defined in the charter – point to wall where they are located. - Share what the Sponsor, Manager, and Team Members roles are, and stress how important implementation will be to collective success. - Elicit questions and use parking lot FC as needed. • Briefly review with p's o Safety exits o Logistics, restrooms, etc. o Introduce the VSM Participant Workbook and review agenda and outcomes. **PW p. 3** o Review Team Process Norms **PW p. 4** o Explain purpose of "parking lot" and "assumptions" • Participant introductions and check-in. Note: do some kind of introduction (name and role in the organization) even if it appears everybody knows each other. You may tailor the check-in to the specific needs of the team. Keep this simple and brief. Some options include: o What I expect of our team and myself over these three days is ________. What I intend to contribute to this VSM team is ______. (That is, how I will support the success of this team.) o What I most want to improve in our work area is _____. o What will be most challenging for me over these three days is ______. And what I would like for support from the team is _______. o **What is the single most important part of the process that you would like to improve?** • Share the one-page model of entire VSM process and explain. **PW p. 16.** The purpose of this is to provide an overview and ground p's in where we are in the process. Reassure them that we will get to the "fix-it" stage. Do not go in great detail – this is an overview. • Inform p's that you will be meeting with practitioners during breaks and lunch in order to review where we are in our agenda and to make course corrections as needed. We are also learning, so we debrief with each other, and give each other feedback. We will check-in with the sponsor/manager as well to elicit feedback. We call this "staffing."	• Page 5-6 Roles in PW

Time/Topic	Purpose and Method	Materials Resources
	• Check with p's to see if there are any other logistics they have questions about. • Roles and responsibilities: review this in **PW p. 5-6.** - Ask p's to read the section in their workbook - In pairs: discuss any questions for clarification?	
8:30 – 8:45 **TEAM CHARTER**	**Purpose:** • Insure clarity and alignment about the purpose and boundaries of the VSM. • Model effective team process. **Methodology:** • Invite the VSM Manager to read/review the team charter, ask participants to reference their copy on **PW p 8-10.** • When talking about boundaries/bookends, refer p's to the boundaries/bookends labeled on the butcher paper. Ask if there are any questions, comments, or concerns about the boundaries / bookends? (*Note: here we use bookends to mean the boundaries of the process to be mapped. We tend to use the terms interchangeably.)* - Sponsor/Manager responds to questions, comments: either in person by telephone. - Only the Sponsor can expand or contract the boundaries / bookends. • Tell p's that we will keep our work focused on what happens between these two bookends. If things come up outside these boundaries, we will capture them on our "Parking lot" • Practitioner elicits questions, comments, and ensures clarity. • Capture unanswered questions on parking lot as needed. • If nobody is assigned the Data Manager role, ask for volunteer. If no volunteer, Manager assigns. - Documents data under the direction of the practitioner. - Commitment is defined in Roles in Workbook (but for "conscripts" can be re-evaluated for on-going purposes). *(Note: the goal is to have a participant be the Data Manager so that they can learn how to do it, thus increasing the internal capacity to work with data and do it for him or herself.)* • Transition to the next piece of work, visualizing the process to be mapped.	• PW p. 8-10 • Team Charter
8:45 – 9:15 **VISUALIZE PROCESS TO BE MAPPED**	**Purpose:** • Visualize the steps and sequence of the process to be mapped. • Get everybody on the same page about what the process is. • Understand the process boundaries. • Begin forming the notion of developing a process mindset. • Engage participants in order to create commitment and ownership of the work and process. • Quickly generate data about the team's collective understanding of the process as a base from which to work.	• VSM Participant Workbook • **Worksheet: Visualize Process to be Mapped** • 4x4 post-its, buff/yellow, at least 10 sheets for each participant • One sharpie for each participant • Wall with butcher paper

Time/Topic	Purpose and Method	Materials Resources
	Methodology: • Read aloud ***Worksheet: Visualize Process to be Mapped*** to the group. **PW p. 19.** • Ask if there are any questions • Start process**:** Tell the p's that they have 3 minutes to individually brainstorm steps in the process. Tell them to o work individually, silently. o write one step per post-it. o write very quickly, o write big and legibly. o not worry about thoroughness, accuracy. Just get down as many steps as they can. • After 3 minutes, call time and invite ALL team members to get out of their chairs and come stand at the wall. • While standing at the wall, tell p's" *"We are going to quickly collect the data we've just generated. We will do this in round robin fashion. We'll start to my right, and the first person will place three of their post-its on the wall, and read them out loud as you post them. Quickly. Questions for clarification only as we go. The next person posts three, and so on. If there are duplicates, place them on top of the one already there. We will continue round robin until we are out of post-its. IF you have no post-its left, just say "pass." If, as we post the steps you have another idea, just write it on a post-it and we'll collect it in the next round. Okay, let's start."* • This is a group brainstorm and needs to move quickly. If needed, remind p's that a brainstorm means any and all idea and thoughts are included. We are simply getting as much information out as quickly as possible. • As you go, be sure to check in with the group to see if there are questions for clarification only. • Continue Round Robin posting until most people "pass" – then do a final round of each person placing their remaining post-its. • When all the post-its are up: Invite p's to look at what's on the wall and ask them to go to the wall and organize them in sequence. If there are duplicates, tell them to just place them on top of each other. • Reinforce that it is okay not to have every step – we want to start by agreeing on the big picture. • While the whole team can be involved in the organizing, if in your VSM one person is organizing the post-its, and somebody else wants to change it, that person needs to tell the group what they are doing and why. • Once the p's feel like they generally have the sequence down. Ask one of them to write the name of the first step LARGE on an 8x11 white piece of paper. Then place the large step names high on the front wall in sequence – so we can visualize the process to be mapped. • Continue in the same way quickly on through the process. • Reassure p's that it's okay if they are missing some steps. The purpose of this activity is just to make sure we are all talking about the same process and to be sure we have the big "chunks."	

Time/Topic	Purpose and Method	Materials Resources
	(*Note to CIP*: *Do not do anything that psychologically invites p's to feel that they need to get this perfect, right, or finished. Do not put on data sheets, do not number, etc.***)** • Transition: Process Mindset. Say something like: *Part of our learning individually and as an organization is to develop a process mindset. Having a process mindset means that the notion of "process" is so imprinted into my worldview that it is an automatic filter from which I view reality. So much so, that when I'm asked what I do for work, I see a process, not simply a task or an event. Not only do I see a process, but also I see many processes, weaving together. .*	
9:15 – 9:45 **CURRENT STATE LEAN INPUT** • Lean definition • VSM Overview	**Purpose:** To prepare participants to effectively value stream map the current state of their process by: • Providing an overview of the VSM process. • Generating a shared understanding of relevant lean concepts and terms necessary to effectively map the current state. • Reinforcing the importance of a standardized approach. • Introducing the data sheets, and the measurement and metrics requirements. **Methodology:** • Elicit from p's their understanding of what Lean is and ask for examples. Then give the definition from **PW p 14-15.** • Discuss the pages in Workbook: *What is Lean?* Highlight 4 principles: 1) Know your customer – who they are and what they want. 2) The customer defines value. 3) Keep the process simple. 4) Do "it" right the first time. • Then talk about waste, flow, process mindset, and define what value stream is. Tell p's we'll be talking more about all of these in the next sessions.	• What is Lean? **PW p.14-15** • Overview VSM **PW p. 16** • FLOW activity could be done during this time in place of presentation/print-outs. See separate flow design notes.
9:45 – 10:15 **WORKSHEET VA & NVA**	• Transition: Now let's look more closely at one of the lean concepts, value added and non-value added. • Read the **Worksheet: Value-Added versus Non-Value Added**. **PW p.20** - Option: can complete individually, or in trios – depends on time. • Debrief the Worksheet VA versus NVA: - All answers are NVA except 3, 6, & 7, which are VA. - Statement (9) is NVA, however, if the customer requires that one form is kept in a local office, then this activity would be 50% NVA. - Explain and discuss that that something may be NVA but necessary and/or required. Elicit examples from p's. ➢ Teaching point: The whole set of questions/examples illustrate specific wastes inferring specific Lean remediation. This is an important concept. • Tell p's, after break we are going to use these concepts we've been talking about in a practical way.	• **Worksheet: Value vs. Non-value-Added p. 20**

Time/Topic	Purpose and Method	Materials Resources
	• Transition to the data sheets after break.	
10:15 – 10:30 **BREAK**	• Meet with your practitioner team. Elicit feedback and make any course corrections.	
10:30 – 10:40 **DATA SHEETS**	**Purpose:** • Position participants to successfully and enthusiastically complete the data sheets. • Minimize resistance as team examines its own process. **Methodology:** • Review the **Working With Data Sheets** section in their **PW p 23.** • Introduce them to the data sheets, sample in their **PW p. 24** • Do not go through each definition. You will do that when you are using it for the first time when they start doing the last step of the current state. • The intent is to give them "just-in-time" definitions, tips, and guidelines when they are actually using the data sheets. So this piece is relatively short now. (*Note: Be prepared for some resistance when introducing the data sheets – assure them that they will be given the support they need.)*	• Data sheets **PW p. 24**
10:40 – 12:00 **CURRENT STATE MAP**	**Purpose:** • Visualize and document the current state by applying VSM tools, working toward consensus, and staying open. • Measure each step, note problem areas, and identify potential improvement opportunities. **Methodology:** • Read **Worksheet: Current State Mapping (PW: page 22)** to the group. Point to materials on the wall as you read about them on the worksheet. (*Note: capture rationale and document how you did it.)* • Tell p's: "Rather than talk about it any more, let's just start creating the map, and we'll get questions answered as we go along." • Go to the **End Bookend** and Ask participants: ***What is the step just before this bookend?*** • Facilitate the team to agree on the step. Ask the Data Manager or another team member (so the Data Manager can stay by the wall) to write the name of the step on the data sheet in LARGE BOLD LETTERS and to post the data sheet on butcher paper. • Explain that we start with the last step first in order to clarify the steps in the process in a thoughtful manner and to stay focused on the customer. --- • **As or just before you put up the first step, document the following (3) decisions on the flip chart. Or write directly on the butcher paper.**	• **Worksheet: Current State Mapping p. 22** • **Data Sheet Definitions and Guidelines p. 24** • Parking Lot (FC) • Assumptions (FC) • Poster • Metrics Calculator (The metrics calculator needs to be loaded first-to-last, so data cannot be entered as the current state steps are put up. However, it doesn't take very long to load the data.)

Time/Topic	Purpose and Method	Materials Resources
	It is a good idea to have discussed this with the Sponsor and/or Manager before the VSM so that they are aware the information and data will be needed and can be sure to be prepared. **1)** Ask p's ***"What is the unit of work we're tracking?"*** When have consensus, write it down. **2)** Then get annual volume of what that unit is so they can later calculate the summary data. Ask p's, ***"How many units do you do in year?"*** Or, you may back into it by first asking, ***"How many times in a day, week, a year?"*** Use math to bring out to a year. Write it down. Most p's will probably not know the answer to this. Sponsor should know.] *(Note: Questions 1 & 2 are to get to how many outcomes are completed per year. So we ask questions that get a numerical answer and then calculate the per-year value and seek that the resulting number is okay.)* • If the lead-time is long (more than a few weeks) or if counts started or completed are not available – the following alternative technique may be more helpful. Sometimes the number available to the group will be the number of cases/forms/requests "open" or "in process" at a point in time. This number can be used though it needs to be adjusted as follows: **(Number open or in process) / (Lead Time converted to years) ~= Outcomes per year.** Example: the only number available is that there are 1,500 cases open and you just calculated the lead-time as 18 months or 1.5 years. So 1,500 cases / 1.5 years = 1,000 cases per year. If the lead time is say a half year then the count is adjusted upwards using the same formula: 1,500/.5 = 3,000. This might also be used as a crosscheck if both types (completed versus in-process) numbers are available. If no number comes forth, put in what is an estimate and note that, and then and there create a process to better estimate the number with group members (and others) counting for at least a short period. This will also be true if "the number is not here". In any case set a time certain that a number will be generated if the number there is not agreeable. (The group contract should be that they come up with a number now, or come up with one, through a process and timeframe, later.) (Time 15 minutes to a half-hour.) **3) To completely capture this process from bookend to bookend, will we look at a day of this work – or a week, month, year, other?** --- • Ask participants to keep their **Data Sheet Definitions** in front of them as you work through the metrics on this step. **(PW p. 24)**	

Time/Topic	Purpose and Method	Materials Resources
	• Facilitate the team to complete the data sheet on that step and have the Data Manager record on the data sheet. • Be sure to document assumptions by placing them on flip chart • Use trainer materials in **Chapter 6 of CIP Manual** as a reference. • Continue through each step in the process. Asking, what is the step just before this one? (*Note: You may notice that as this step work continues that the Data Manager may naturally do more and more of the "facilitating" of each step – or that you may want to encourage that to happen. In this event, step in/support only to assure that the step/data sheet work flows smoothly and in a timely way and to provide expertise where needed. Where this has happened, it has generally served to increase team "ownership" and re-enforced role identification & team esprit de corps.)* • Identify steps that need focus when the future state is being constructed by circling them or placing dots on them – highlighting them in some way. We will come back to these tomorrow. • **Notes about a step itself are noted on post-its of the same color (buff/yellow for Current State).** • Place ideas for improvement, using blue notes, on the related step or on the Parking Lot if applicable to the entire process. ➢ Blue notes: Use these to write ideas for improvement on future state. Be sure each participant has some. - If ideas, comments, etc. are about a specific step, post the blue note with the step. • Do not get hooked into trying to fix or solve the problem. Remind p's that - *"At this point, the focus is simply on getting a picture of what is actually happening."* • Assumptions: Use the assumptions FC to capture all assumptions that come up. Invite p's to pay attention when they are making assumptions and remind them to make them explicit – say them out loud so we can capture them. An example of an assumption is "batches of 500 are equal to one." Or "the director is not required by law to sign" – we're assuming but nobody knows for sure. - If an assumption is about a number in a step, post it with the step. If it is about the process, put it on a flip chart. • The idea is to keep all the information about a step, with the step.	
12:00 – 12:30 **LUNCH**	• Meet with the staff. Elicit feedback and make any changes to improve the experience for the team. • FC two questions and see below (if haven't done already)	• FC
12:30 – 12:40 **CHECK-IN**	**Purpose:** • Model effective group facilitation and attention to process. • Model using data to improve the process of how the team is completing its task. **Methodology:** • Start-up: (10") As you start-up after lunch, if you think it is appropriate, ask the p's: - What is working well for us as we move through this process that we want to keep on doing?	• FC of two questions

Time/Topic	Purpose and Method	Materials Resources
	- What do you think we need to change that would improve how we are working together? • Have the questions on a flip chart. Elicit responses round robin rather quickly. Do not take the time to write responses down. Make necessary changes based on responses to the questions.	
12:40 – 2:15 **CS MAP CONT'**	**Purpose:** • Continue the current state map and have team experience movement forward in the accomplishment of the task. **Methodology:** • Continue completing the Current State Map. Be sure to provide encouragement and tell the team what they are doing well.	
2:15 – 2:30 **BREAK**	• Meet with your practitioner team. Elicit feedback and make changes as needed. • Assess where team is with time and task, and decide how you will do the Current State Calculations.	
2:30 – 3:00 **CS MAP FINISH**	**Purpose:** • Finish the current state map and have team experience success in the accomplishment of the task. **Methodology:** • Finish mapping the current state	
3:00 – 3:30 **CURRENT STATE CALCULATION**	**Purpose:** • Measure the current state as a baseline in order to demonstrate improvements. • Increase confidence and competence of team in working with data in order to facilitate a shift in mindset and culture. • Generate team commitment and ownership of the data. • Increase understanding that this is how we should be working – this is the work. **Methodology:** • The preferred standard is to have the team do the calculations. (***Note:*** *Because this may be a time crunch, you may have to do calculations yourself or, where possible, with the Manager and/or Data Manager, after the session.)* (*Note: If there are parallel processes – branching -- see the CI-P Manual before continuing, as there will be additional instructions.*) • Be prepared to demonstrate the instructions on **Worksheet: Calculating Current State Metrics** in **PW p. 27.** • Be sure the wall is prepared with appropriate headings. And if you do not have wall space, prepare a FC using the same format on the **Worksheet: Calculating Current State Metrics**. --- **Team completing calculations:** • Refer team to **Value Stream Mapping Measurements** in **PW p. 29.** • **Read** **Worksheet: Calculating Current State Metrics** in **PW p.**	• Lap top • Metrics Calculator • Printer • Data sheets • **Value Stream Mapping Measurements** • **Worksheet: Calculating Current State Metrics p. 27** • Calculator(s) • Markers

Time/Topic	Purpose and Method	Materials Resources
	27. • Assign p's to calculate the metrics and write their name on the FC, and ask them to write their name on the worksheet. Start with number 1 (the easiest calculation) and progress through to #7. • **Use the instructions on the worksheet. Demonstrate for team members as needed. When you get to #7 use the annual volume data that you've already defined.** • Explain that the Current State data will be added to Metrics Calculator after session. It will be entered, printed, distributed either at the next session, through e-mail beforehand, or both. • Standard: use the spreadsheet but, for the summary metrics, not in lieu of participants doing the metrics. The spreadsheet is an excellent summary document, producing charts, etc.. • The summary metrics are to be done with the group whenever possible.	
3:30 – 4:00 **REVIEW CURRENT STATE DATA**	**Purpose:** • Highlight opportunities for improvement. • Model using data to make decisions and set priorities. • Continue generating team commitment and ownership of the data and the process. **Methodology:** • Ask the group to now mentally, "step back" from the process, and look at the data. What is the data telling you about the process? What are the areas that seem to need improvement? • Give the p's **examples of practical tips as a place to start:** - First pass yield less than 95% - Change over time is high - Up time less than 90% - Inventory is significantly higher than other steps (bottleneck) - Cycle time significantly higher - Low value added (less than 50%) - Any number significantly out of sync with the others. • As they do this, ask if any of the areas they're identifying should be considered for improvement as they work on the Future State in the next session. If yes, have them mark those with a red dot. • Elicit responses from the group, and add to their observations as appropriate. • Ask the p's: Where are issues around flow? Waste? • Say that they can now visualize and see their process, maybe for the first time.	• Capture on FC • Red Dots
4:00 – 4:30 **CHECK-OUT & ASSIGNMENT**	**Purpose:** • Assess level of group development by collecting data. • End the day in alignment as a team. • Invite p's to be prepared for the next session and the Future State.	• FC matrix questions

Time/Topic	Purpose and Method	Materials Resources
	Methodology: • Ask p's to read the next sections in their **VSM Participant Workbook**, with special focus on Future State and Implementation Plan. • You want p's to have reviewed at least the key the **8 Wastes & Lean Concepts**. • Depending on the amount of time and your perception of where the team is you have options about how to end the day: • Review the agenda for the next session and thank p's for their work today. **Options for Check-Out:** • Two Words: Round robin, ask each person to give one word feeling as they end the day, and one word describing their experience of the day. • Delta: Round robin, ask each p' to say what went well today and what could be improved? FC responses only if you have time. Otherwise, just collect the data and track for patterns. • **Survey Content/Process: Ask p's to reflect on their own contribution today (what/content) and how (process) well they individually followed the learning community behaviors.** Have FC on the wall with these two questions, and matrix with numbers 1-7. Invite p's to assess themselves on a scale of 1-7, with 7 being excellent and 1 being unsatisfactory. On their way out, ask them to write the number on the FC that most accurately reflects their own assessment of themselves. - If you use this one, you will start-up day two with reviewing the results of this quick survey. • What is exciting you about today's work? What is frustrating you or concerning you?	

VSM Supplies/Materials Kit

This is the list of supplies and materials required for each VSM team. It assumes a total of 15 participants, including the CI-Practitioner. Adjust the quantities as needed. Use this as your checklist when "kitting" your supplies and materials to ensure they are available when needed.

Note: You may need to reduce the size of the VSM Data Sheets from 8.5x11 to 4.25 x 5.5 if you are limited on wall space. The preference is to use the 8.5x11 so that information may be written large enough to be visible to all VSM team members at all times.

Status	Item	Color	Size	Amount
	Supplies			
	VSM Data Sheets-Current State	Buff or lgt yellow paper	8.5 x 11	36
	VSM Data Sheets-Future State	Light Green paper	8.5 x 11	36
	VSM Visualize Process-CS	White paper	Letter	50
	Kaizen Burst Sheets	Red paper	Letter	5
	To-Do Spreadsheet	White paper	Legal	3
	Flip Chart and stand			One
	Post-its pads-Current State	Buff/Yellow	4 X 4	15
	Post-its pads-CS Improvement	Blue	4 X 4	3
	Post-its pads-FS Improvement	Dark Pink	4 X 4	2
	Post-its pads-Future State	Light Green	4 x 4	2
	Flip Chart Markers	Black		2
	Flip Chart Markers	Blue		2
	Flip Chart Markers	Green		2
	Sharpies-Finer Point	Black		2
	Removable Scotch Tape Roll			2 rolls
	Permanent Scotch Tape Roll			2 rolls
	Masking Tape Roll			2 rolls
	Self stick Dots	Red and Yellow	3/4 inch	One Box each
	Duct Tape			1 roll
	Calculator			One
	Name Tags	If adhesive	LARGE	45
	Pens			15
	Flip Chart Paper or Rolls of Paper to Line Walls			Two pads
	Thumb Tacks or Push Pins if walls are fabric			One container
	Time Keeping Device			One
	Materials			
	Pre-VSM Participant Handbook	(Pre-sent)		15
	This Team's Charter Inserted in VSM Participant Workbook			15
	VSM Participant Workbook			15
	VSM Detailed Design Notes			One / CIP
	CI-P Debrief Form			One/CI-P
	Posters			
	What is Waste			One
	What is Lean Poster			One
	Lean Principles /Concepts			One
	8 Wastes			One
	Team Process Norms			One
	House of Lean & Pillars			One each

	Electronic Files			
	Metric Calculator			One
	Excel Spreadsheet			One
	Equipment			One
	Digital camera			One
	Laptop			One
	Projector			One
	Power Strip			One
	Extension Cord			One

NAME OF THE STEP	
STEP DESCRIPTION	
SPECIAL CONSIDERATIONS	
WORK WAITING for this Step	
C-T CYCLE TIME	
# 0F PEOPLE	
S-T TOTAL STAFF TIME	
V-A VALUE ADDED %	
R-N-V-A REQUIRED NON-VALUE-ADDED %	
C-O CHANGE OVER TIME	
U-T UP TIME %	
F-P-Y FIRST PASS YIELD	
NOTES:	